

ConformX Desktop Installation Guide

Prerequisites:

- The installing user must have administrative access on the local machine, or terminal server. If you're installing the software on a terminal server environment, you **must** be in "installer" mode.
- The latest Microsoft service packs, and the .NET framework must be installed prior to installing the ConformX Desktop software.
- The installing user must know their client ID. Existing clients should already have a client ID assigned to them, and new clients will be given an ID from their project manager.
- It is recommended that this be installed on a test machine and tested before deploying to your production environment.

Software Download:

- Open an Internet Explorer window, and navigate to [DocuTech's download site](#).
- If you don't have a previous version of the DocuTech software installed, you'll want to use the 'Full Install', as indicated below:

Current Customers:

* Please contact Docutech Client Support prior to running this update at 800.497.3584 to have your client settings transferred to the new version.

ConformX Desktop Version 8.5.0 Release Notes - [Download Now](#)

ConformX Desktop Installation Guide - [Download Now](#)

ConformX Desktop Version 8.5.0 Full Install - [Download Now](#)

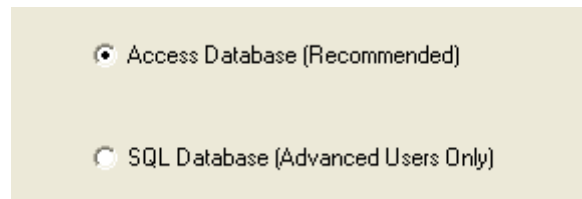
*ConformX Desktop Version 8.5.0 Update - [Download Now](#)

- After clicking 'Download Now', a File Download window will appear. Click 'Run' to load the setup wizard instantly, or click 'Save' to store the installation file on your local machine. (See below)

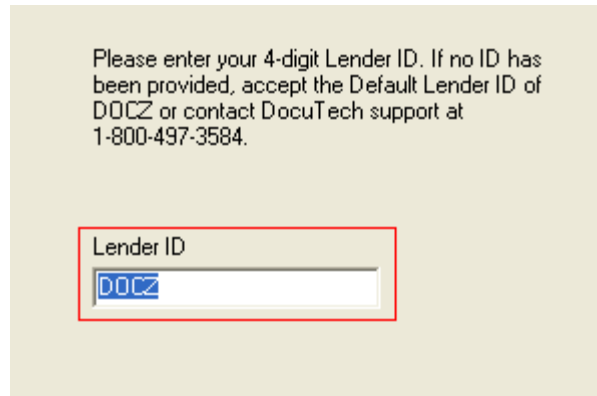


Installing the Software:

- Run the installation file that you've downloaded.
- Click 'Next' on the Welcome Screen.
- Select the database method you'll be using on the Database Type Screen, and then click 'Next'. By default, ConformX Desktop uses a Microsoft Access database (see below), but SQL is an option. If you'd like to use a SQL database, please speak to a member of the DocuTech staff prior to installation.



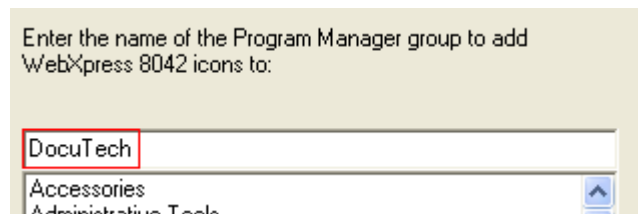
- You'll now be prompted to enter your 'Lender ID'. (see below) If you don't have this information available, you'll want to contact DocuTech before continuing.



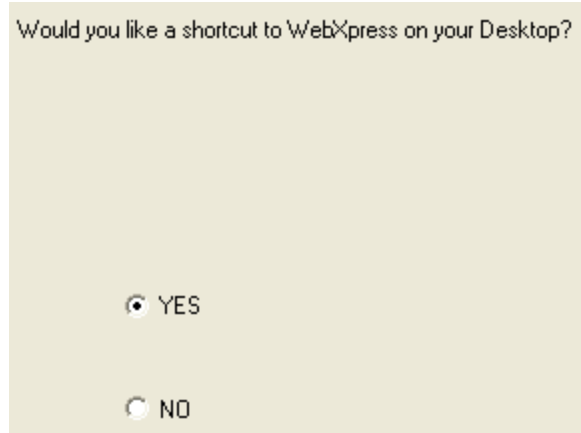
- On the next screen you'll choose the destination of the DocuTech application files. By default, the destination directory is C:\DocuTech, but you can modify this as needed. After the folder is set, click 'Next'.



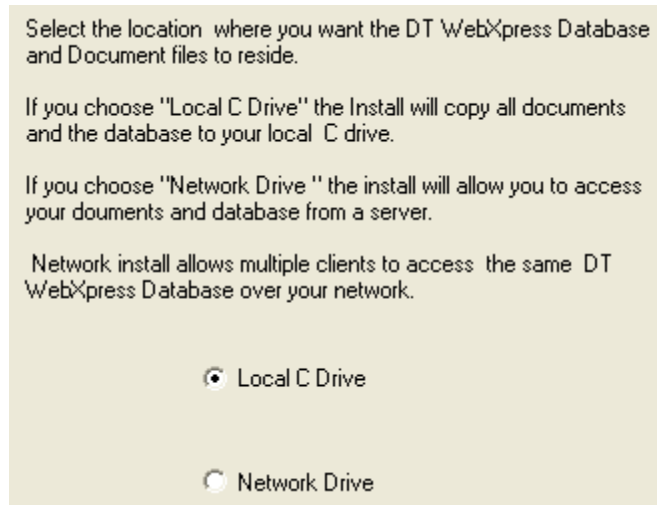
- Next, we'll take the default on the following screen to create a DocuTech program group. Click 'Next' to continue. (see below)



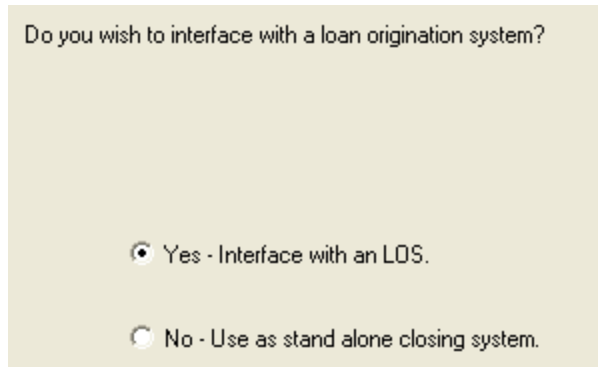
- The next screen asks if you'd like to have an icon placed onto your desktop for the DocuTech software. By default, 'Yes' is automatically selected. You may change this option if you prefer, and click 'Next'.



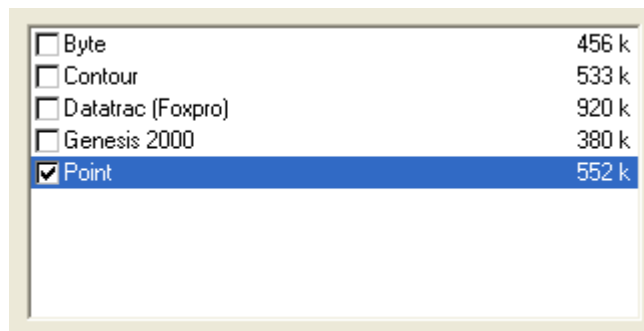
- On the following screen, we have the ability to store the access database locally, or store it on a network share. You can change this option as needed, and select 'Next'.



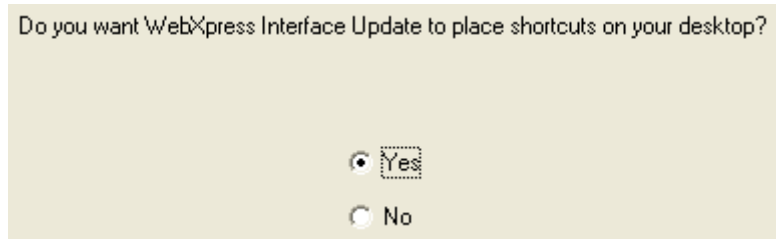
- Then, the installation will ask if you're interfacing from a Loan Origination System. If you're using Point, Genesis, DataTrac Foxpro, Byte, Contour, or MortgageWare, you'd select 'Yes'. Otherwise, choose 'No'.



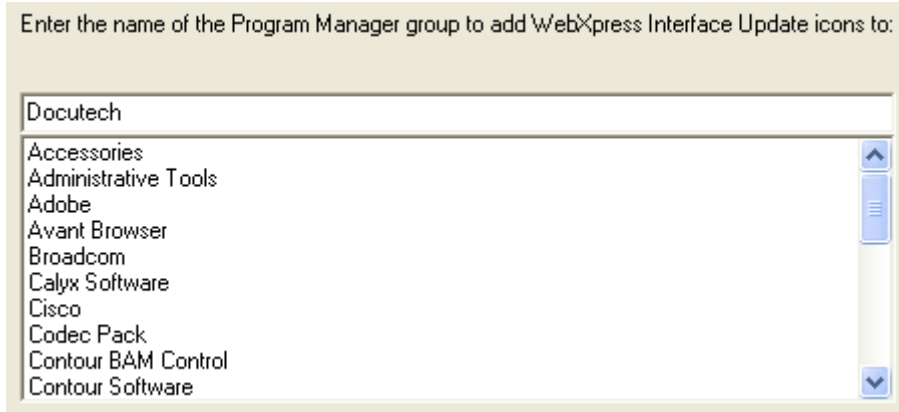
- The installation will now begin, which may take a few moments. After the copying of the files, you'll be prompted to select the necessary interface updates that you need installed. After you've chosen your loan origination system, select 'Next'.



- Again, you'll have the option to place interface update shortcuts on your desktop. Since all software releases include interface updates, I usually select 'No'. Make your selection is click 'Next'.



- Also, the interface update will also prompt for a program manager group. I'd recommend just taking the default, and then click 'Next'.



- After this, the installation will copy a few more files, and then the setup will be complete.

Checkoff:

Verify your users have full read/write access to the following locations:

- C:\DocuTech
- The folder which contains the database.
- 2 folders in the registry (HKEY_Local_Machine\Software\DocuTech & HKEY_Local_Machine\Software\ODBC)

After the installation, and verification that the permissions are set correctly, open the software. If you have any additional inquiries on the software, or importing into the software from your loan origination system, please contact DocuTech at 1-800-497-3584.